

Electronic Personnel Action Forms (EPAF)
Hiring Student Employees

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Document Updates

Version	Date	Notes
1.0	07/08/2013	Initial Version
1.1	07/16/2013	Updated recommended comments section to remove requirements
1.2	11/14/2013	Updated Co-op index to indicate “Department Indices only”
1.3	12/04/2013	Updated processing reference links
1.4	11/03/2014	Updated manual
1.5	1/28/2015	Updated Current Hire Date information in PEAEMPL section
1.6	6/24/2015	Added browser support statement (no support for IE).

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Information Non-Disclosure at NMSU

New Mexico State University maintains the confidentiality and security of records in compliance with the Family Educational Rights and Privacy Act of 1974 (FERPA), the Health Insurance Portability and Accountability Act (HIPPA), and the Gramm-Leach-Bliley Act GLBA), in addition to other federal and state laws. These laws pertain to the security and privacy of personal academic, medical and financial information, along with identifying information such as social security numbers.

Family Educational Rights and Privacy Act of 1974 (FERPA) Policy:

<http://research.nmsu.edu/compliance/IRB/resources.html#3>

FERPA protects students' records. FERPA requires post-secondary educational institutions and agencies to conform to fair information practices in their handling of student data. Among the provisions of the act are the requirements that data be used only for intended purposes and that those responsible for student data take reasonable precautions to prevent misuse of it. Examples include Social Security Numbers, grades, date of birth, etc.

Health Information and Portability Accountability Act (HIPAA):

<http://research.nmsu.edu/compliance/IRB/resources.html#7>

HIPPA protects all medical records and other individually identifiable health information used or disclosed in any form, whether electronically, on paper, or orally.

Gramm-Leach-Bliley (GLB) Act:

<http://www.nmsu.edu/manual/documents/07-29-09-policy-manual-final020110.pdf>

GLBA protects private, non-public information of individuals. Private, non-public information consists of information such as name, Social Security Number, date and location of birth, gender, credit card numbers and driver's license numbers.

Within NMSU, employees are authorized access to University records only to the extent necessary to perform their official university duties, and are responsible for protecting such information against unauthorized access or disclosure.

The New Mexico State University Policy Manual, **Chapter 2** General Operating Policies, Section 2.90 contains specific information related to disclosure of records and information.

Examples in this manual may have personal data altered or blacked out to ensure privacy.

What is an EPAF?

An Electronic Personnel Action Form (EPAF) is used to originate electronic documents needed to process personnel actions, such as hiring transactions and changes to existing job data.

EPAF is a Banner module that was designed to accommodate a more efficient approval signature process for centralized and decentralized HR operations or actions. It improves and simplifies the process for completing and approving a wide range of Personnel Action Forms (PAFs) for all employee types.

EPAF actions are originated electronically by the various departments within the university to communicate employment decisions about their employees to the HR and Payroll department. They are then electronically routed to the appropriate approvers. Once approved, they are applied to Banner directly by a central process.

EPAF is fully electronic (Web-based) and EPAF actions can be created and routed using Banner Employee Self-services (ESS) which is accessible through myNMSU. Access to EPAF is not granted to all NMSU employees; it is only for those employees who have been designated in the system as EPAF originators and/or approvers.

The type of EPAF you create depends on the change you are making. Additional EPAFs will become available in the system as they are developed. The different types of EPAFs are classified as “Approval Categories”. In addition to general functions of EPAF, this document describes how to process student employee hiring actions in the HSHIR Approval Category.

EPAF key features


Default values

The EPAF system populates default field values based on the EPAF category selected as well as information obtained from Banner, such as previous job and employee record information.

Most default values can be changed if needed, however some values are automatically populated and cannot be changed. Fields that cannot be changed are indicated as **not enterable** next to the field label.

Default values are a benefit because they save time when completing EPAFs for the most common types of transactions.

Lookup fields

Lookup fields are used to search and select appropriate values for a field. EPAF integrates with Banner data in order to help find a variety of values, such as values related to employees, organizations, and positions. Lookup fields are indicated by a magnifying glass icon .

Field validation (error checking)

EPAF uses a two stage validation check that examines entered values to determine if the values are valid given information about the transaction that you have provided. For example, EPAF validates effective and personnel dates based on the job change reason you have selected.

If an EPAF transaction fails validation a message will display indicating the details about the failed validation and how to resolve the issue. There are three types of validation messages, *Error* messages, *Validation* messages and *Warning* messages. Validation messages indicated as **ERROR** or **VALIDATION** must be corrected in order to submit the EPAF for approval. Validation messages indicated as **WARNING** should be noted; however you may submit the EPAF for approval if a warning message exists.

An error will prevent you from submitting the EPAF until the error is corrected, but you can still save the EPAF if errors are present.

How to access EPAFs

What you should know before you begin the EPAF process

As you begin an EPAF the system will require specific information about the transaction that you should gather ahead of attempting to originate an EPAF. Specifically, you should know the following details about the transaction, or obtain this information, before you create a new EPAF.

- AggieID (ex. 800XXXXXX) of the person to be hired *
- Personnel date of the person to be hired (the date the person will report to work)
- The position number for the position that will be filled

* If the person you are hiring does not have an AggieID or they have never worked for the university, please complete the New Hire form on the HRS Web site (<http://hr.nmsu.edu/managers/newhire/>).

Access is required to use the EPAF system. Please download, complete, and route the security form to gain access to the system:

<http://af.nmsu.edu/forms/>

Some job aids and tools will also help:

Processing Toolkit – The Processing Toolkit is a collection of resources that provides details about hiring student employees, including information about regular and work-study employment processing using EPAF.

<http://hr.nmsu.edu/toolkits/>

Work-study Resources – Provides information about Federal, State and Crimson Scholar Work-study Programs at NMSU.

Work-study Handbook: <http://fa.nmsu.edu/work-study/handbook/>

Work-study Employer Responsibilities: <http://fa.nmsu.edu/work-study/employers/>

Access EPAF through my.nmsu.edu using your browser

Please Note:

Internet Explorer is not support. We recommend alternate browsers such as the latest versions of Mozilla Firefox, Google Chrome, or Apple Safari.

The EPAF system is accessible through myNMSU. The myNMSU portal allows you to use a single user name and password to access many of the electronic services at NMSU.

The screenshot shows the myNMSU portal in a Mozilla Firefox browser. The address bar shows the URL <https://my.nmsu.edu/web/mycampus/home>. The page has a purple header with the NMSU logo and a 'Sign In' link. Below the header, there's a 'myNMSU' section with a login form. The login form has two input fields: 'Login:' and 'Password:'. A red circle with the number '1' is around the 'Login:' field. Below the 'Password:' field is a red circle with the number '2' around the 'LOGIN' button. There are also links for 'Forgot Username?' and 'Forgot Password?'. To the right of the login form is a yellow box with 'Scheduled Maintenance, November 29, 2012' and details about a network outage. Below that is a 'Dear NMSU Community:' section with a link to the 2012 United Way Campaign. Further down are sections for 'Registration and Schedule Information', 'Banner and Cognos and NMSU', and 'Frequently Requested Help'.

<https://my.nmsu.edu>

1. Enter your NMSU **User Name** and **Password**.
2. Click on the **Login** button.

What's New?

MS Office 365 ProPlus Software for all active students
If you're an active student at NMSU, you qualify for the Office 365

Click here for information on how to download:
<http://studenttech.nmsu.edu/microsoft-office-pro-plus-software-f>

OneDrive: One place for all of your documents!
Check out the 25 GB OneDrive located in your Office 365 email. O
OneDrive and access them on any device!

AggieAir Wireless Expanded to Housing
Students who live in Residential Housing on the Las Cruces main

3. Once logged into myNMSU, click on the **Employee** tab.

Personal Information **Student** **Financial Aid** **Employee** **Finance** **Proxy Access**

Search

Main Menu

Welcome, Sally A. Rel, to the WWW Information System! Last web access on Nov

[Personal Information](#)
Update addresses, contact information or marital status; review name or social security number change

[Student](#)
Apply for Admission, Register, View your academic records.

[Financial Aid](#)
Apply for Financial Aid; View financial aid status and eligibility, accept award offers, and view loan applic

[Employee](#) 4
Time sheets, time off, benefits, leave or job data, paystubs, W2 and T4 forms, W4 data.

4. Click on **Employee** to open Self-Service Banner in a new window or tab.

NM STATE New Mexico State University

Personal Information **Student** **Financial Aid** **Employee**

Search

[RETURN TO MENU](#) [SITE MAP](#) [HELP](#)

Employee

[Time Sheet](#)
[Leave Report](#)
[Request Time Off](#)
[Electronic Personnel Action Forms](#) 5
[Benefits and Deductions](#)
Retirement, health, miscellaneous and benefit statement.
[Pay Information](#)
Direct deposit allocation, earnings and deductions history, or pay stubs.
[Tax Forms](#)
W4 and W2 information.
[Jobs Summary](#)
[Leave Balances](#)
[Direct Deposit](#)
[Effort Certification and Labor Redistribution](#)
[Salary Letter](#)
[Tuition Waiver - Dependents](#)
[Tuition Waiver - Employee/Spouse](#)
[Update Preferred First Name](#)

RELEASE: 8.8.1

5. Select **Electronic Personnel Action Forms**.

EPAF Categories

Categories are used to select specific data entry forms related to the personnel action you want to perform. In the following section we detail the Student – Hire/Rehire, HSHIR category, describing each field that is available on the form including a basic description of acceptable values and relevant examples.

Student – Hire/Rehire, HSHIR

This section describes the process of completing a **Student – Hire/Rehire, HSHIR** approval category to hire a Regular and Work-study students.

Creating a new HSHIR EPAF

1. From the Electronic Personnel Action Form screen, click **New EPAF**.

2. Enter the Banner **ID** of the employee that will be affected by the EPAF transaction.
 - You can do a search for the Banner **ID** by clicking on the magnifying glass. Employees can be looked up using their first and last names, Banner IDs and/or SSNs.
3. Enter the **Query Date** (defaults to today's date). See the section labeled "How to determine the query date" for additional details about how to select the appropriate query date for the transaction.

4. Select the **Approval Category** as appropriate. In this case we are creating a *Student – Hire/Rehire, HSHIR* EPAF.
5. Click **Go**.

How to determine the query date

The query date is used to find jobs and display the job status for each job as of the query date entered. The query date is also used to default values on the EPAF detail screen.

Caution: The query date defaults to the current date and this may not always be what you want.

The query date must be earlier than or equal to the effective date for the job. ***To ensure that the query date is earlier than the effective date, select the first day of the month for which the employee will be hired.***

For example, if an employee will begin work on 11/15/2014, set the query date to 11/01/2014.

Position Selection Screen

On the position selection screen, you determine the position number and suffix for the action.

The screenshot shows the 'Position Selection Screen' with the following fields and controls:

- Query Date:** Nov 01, 2014
- Approval Category:** Student-Hire/Rehire, HSHIR
- Activate Hire/Rehire NBA:** (Callout 1 points to this field)
- Table:**

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
<input type="checkbox"/>	New Job	999992	00	Student Aide	101000, SPECIAL ORG MAIN					<input type="radio"/>
- Message:** ⚠ There are 1 jobs based on the Query Date. (Callout 2 points to this message)
- Buttons:** All Jobs (Callout 2 points to this button), Go (Callout 3 points to this button)

1. Select a position number

Before you begin the EPAF process you must first know the position number you will be affecting with the EPAF transaction.

Student positions are hired using a single pooled position number: **999992**

Note: The University has moved to a single pooled position number, effective with the EPAF implementation, which will be utilized for all regular, work-study and Co-Op student employment. *Do not use previous student hire position numbers.*

2. Click All Jobs and select a position suffix

Specifying the correct position suffix is important because it helps to maintain a clear employment history for the employee records in Banner. The position suffix is a two digit alphanumeric code that uniquely identifies the position into which the employee will be hired.

First, you'll want to determine if you are re-hiring an employee for a position in your department or if you are hiring an employee for a position in your department for the first time by examining the job history. Click **All Jobs** to see the complete job history.

Has the employee ever been hired at NMSU using this position number according to their job history?

If No, enter suffix 00.

If Yes, is the employee being rehired using the exact same organization number?

- **If No**, increase the highest suffix number by 1.
- **If Yes**, do the payroll effective dates for the new job overlap with the payroll effective dates for the active/terminated job?
 - Yes: increase the highest suffix by one
 - No: Reuse the suffix of the most recently used position number

3. Click Go

4. Click Save.

Click save will populate the PEAEMPL section with information if a PEAEMPL record exists for this person. Also, clicking save will populate the NBAJOBS section with current information from Banner if the position that you are filling is a rehire in your department. This is important because you'll need this information to determine your next steps.

New Mexico State University

Personal Information Student Financial Aid Employee

Search [] Go

RETURN TO EMPLOYEE MENU SITE MAP HELP

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit. OBJECTNAME:bwkpeaf.P_NewPersEpafDetl

Name and ID: Pracilla A. Brendelen, 800XXXXXX

Transaction: Query Date: May 1, 2013

Transaction Status:

Approval Category: Student - Hire/Rehire, HSHIR

Save

4

Approval Types | Account Distribution | Routing Queue | Transaction History

* - indicates a required field.

Remember to click Save before continuing to complete the EPAF form.

Employee PEAEMPL

Each employee has only one PEAEMPL record, even if they have more than one job. In order to maintain consistent information for employees that are being rehired or have more than one position, PEAEMPL should only be updated completely if this is the first job for this person at NMSU and it is only updated partially if the job will be the primary job for this person (i.e. they have no active jobs).

If you are filling a position as a secondary or overload job because the employee already has current active jobs, leave the entire PEAEMPL blank and you should continue on to the NBAJOBS section of the form.

The current information in this section populates PEAEMPL with information provided from Banner. If you can't see the current values for the PEAEMPL record you lack the necessary security to view the record details or no current PEAEMPL exists for this person.

Completing the PEAEMPL section for primary jobs

Employee PEAEMPL (For Primary Jobs Only), 999992-00 Student Employee		
Item	Current Value	New Value
Employee Status: (Not Enterable)	Active	<input type="text" value="A"/>
Employee Class Code:	SR, Student - Regular	<input type="text"/>
Home Organization:	440530, STUDENT ENGAGEMENT	<input type="text"/>
Distribution Orgn:	440530, STUDENT ENGAGEMENT	<input type="text"/>
Current Hire Date: MM/DD/YYYY	08/24/2012	<input type="text"/>
Home COAS: (Not Enterable)	N	<input type="text" value="N"/>
Distribution COA: (Not Enterable)	N	<input type="text" value="N"/>

1. Employee Class Code

The Employee Class is the most powerful rule from within Banner HR, and its attributes “trickle down” to many other areas of the system. The Employee Class is assigned to the Position Class (NTRPCLS), which is then assigned to the Position (NBAPOSN/NBAPBUD), which is then assigned to the Job (NBAJOBS). It establishes earnings codes, leave and benefit categories, FT/PT Status, Pay ID, time entry method, and Pay (salary/hourly) indicator.

Employee Class Reference

Code	Description
SW	Student Work-study
SR	Student Regular (this includes CO-OP Student Employment)
S7	PSL Regular Student
S8	PSL Student Work-study

Enter the Employee Class Code as appropriate. You may also use the search feature to locate a value. If you are manually entering the value, be sure to use capital letters such as **S7** instead of **s7**.

2. Home Organization

The Home Organization is the organization number for the hiring department. You may use the search feature to locate the appropriate value for this field.

3. Distribution Organization

The Distribution Organization is the organization number for the hiring department. Technically, this field determines where paychecks will be sent if they are sent to a physical location. You may use the search feature to locate the appropriate value for this field. The Distribution Organization number must match the Home Organization number.

4. Current Hire Date

You only complete the Current Hire Date for the transaction if this is the first job for this person at NMSU. Otherwise, leave this field blank. The Current Hire date is the same as the personnel date for the position you are hiring. This will be the date that the employee reports to work.

If a PEAEMPL record exists for the employee, even if they don't have any active jobs and the PEAEMPL is inactive, the system will not allow you to enter or update the Current Hire Date field. If you attempt to update the Current Hire Date field in this situation, you will receive an error message.

Errors and Warning Messages

Type	Message Type	Description
Employee PEAEMPL & Activate Hire/Rehire NBAJOBS	VALIDATION	Current Hire Date must be left blank.

* - indicates a required field.

Employee PEAEMPL (For Primary Jobs Only)

Item	Current Value	New Value
Employee Status: (Not Enterable)	Terminated	<input type="text" value="A"/>
Employee Class Code:	E4. Staff PT Temp - Exempt	<input type="text" value="SR"/>
Home Organization:	51 Remove just this value.	<input type="text" value="510038"/>
Distribution Orgn:	510038, EMPLOYMENT & COMPENSATION SVCS	<input type="text" value="510038"/>
Current Hire Date: MM/DD/YYYY	07/01/2013	<input type="text" value="03/01/2015"/>
Home COAS: (Not Enterable)	N	<input type="text" value="N"/>
Distribution COA: (Not Enterable)	N	<input type="text" value="N"/>

Activate Hire/Rehire NBAJOBS, 999992-00 Student Aide

Item	Current Value	New Value
Job Status: *(Not Enterable)		<input type="text" value="A"/>
Contract Type: *		<input type="text" value="Primary"/>
Job Begin Date: MM/DD/YYYY (Not Enterable)		<input type="text" value="03/01/2015"/>

Remember: The PEAEMPL section should only be completed if the position will be the primary job for the employee. Leave the Current Hire Date blank, unless this is the first job for this person at NMSU. If secondary or overload job, leave All PEAEMPL fields blank.

Activate Hire/Rehire NBAJOBS

Item	Current Value	New Value
Job Status: *(Not Enterable)		A
Contract Type: *		Not selected
Job Begin Date: MM/DD/YYYY (Not Enterable)		
Jobs Effective Date: MM/DD/YYYY (Not Enterable)		
Personnel Date: MM/DD/YYYY*		
Title:		Student Aide
Employee Class Code: *		
Salary Grade: *		
Regular Rate: *		
FTE: *		
Hours per Day: (Not Enterable)		
Hours per Pay: (Not Enterable)		
Job Location: *		Not Selected
Timesheet Orgn: *		
Job Change Reason: *		HSHIR, Hire, Student
Contract Number: (Not Enterable)		279778

0

1. Contract Type

The contract type is used to specify if the position that is being filled is a primary, secondary, or overload job for the employee to be hired.

Primary – The primary job is the employee’s primary function and employing department. An employee can only have one primary job at a time and if they have more than one job, one must be designated as the primary. The primary job determines the type of benefits the employee is eligible for, how the employee is reported, how they are listed in the online phonebook, and where pay checks will be sent, etc.

Secondary – A job the employee will be working in addition to their primary job.

In order to determine the contract type you need to collect information about the employee’s job history.

If an employee currently has no active jobs you can specify Primary as the contract type. If an employee currently has an active job you may specify secondary.

If the EPAF is submitted as a primary contract type and the employee currently has a primary job, a validation error message will display indicating that the person already has a primary job. In this case choose secondary contract type and clear all values from the PEAEMPL section to pass the validation check.

2. *Personnel Date*

This is the date that the employee reports to work for this position. The value entered for the Personnel date will be used to determine the Job Begin Date and Job Effective Date.

Reference the processing tools for acceptable values for academic term hires:

<http://hr.nmsu.edu/toolkits/>

3. *Title*

The title automatically defaults to **Student Aide**. In the drop down menu, select the preferred title.

Note: This field is not validated. Please take care when entering a title to ensure consistency and correct spelling.

Use the exact title that best matches the description of the employee's duties.

Title	Description
Student Aide	Student employees whose duties are primarily clerical, labor, or service-worker functions and who usually are not required to bring experience or expertise to the job. These individuals do not supervise the work of others.
Student Assistant	Student employees, whose duties are of a technical and/or professional nature and entail significant responsibility, possibly including the supervision over work of others. Typically a specific expertise and/or previous experience will be required for a Student Assistant position.
Student Co-Op	Student employees whose duties meet the standards for cooperative education as prescribed by the New Mexico Commission on Higher Education, Cooperative Education Network. "Cooperative Education (Co-op) is a formalized program, under the direction of a post-secondary institution, to optimize learning in an alternate setting. Cooperative Education provides experience-based learning for college students through paid employment in practical, curriculum-related work assignments structured to meet students' interests, abilities, and aptitudes while meeting employers' needs." Each term, co-op assignments must be approved by, and students enrolled with, the appropriate Cooperative Education Program office (i.e., the Co-op Office on the main or branch campus that offers the student's major).
Student Grad Spec	Graduate student employees whose duties are of a technical and/or professional nature similar to those performed by Graduate Assistants (e.g., Teaching Assistants, Research Assistants, etc.). Graduate Specialists generally will be paid hourly at rates of pay equivalent to those of Graduate Assistants, as determined by the Graduate School Dean.
Student Server Tipped	Restaurant (Fulton Center/Golf Course) server/beverage cart. Compensation includes earning tips.

4. Employee Class Code

The Employee Class code for the NBAJOBS record should match the Employee Class code for the PEAEMPL record if the job is the primary job for the employee.

Employee Class Reference

Code	Description
SW	Student Work-study
SR	Student Regular (this includes CO-OP Student Employment)
S7	PSL Regular Student
S8	PSL Student Work-study

Enter the Employee Class Code as appropriate. You may also use the search feature to locate a value. If you are manually entering the value, be sure to use capital letters such as **SW** instead of **sw**.

5. Salary Grade

The grade levels relate to the level in the Student Salary Table. Valid values for this field are **WFED**, **WST**, **WCIN**, **WCOUT**, **WTUT**, and **CO-OP**.

Classification	Grade
Regular	REG
Federal Work-study	WFED
State Work-study	WST
Crimson Scholar (In-state)	WCIN
Crimson Scholar (Out-of-state)	WCOUT
Work-study Tutor	WTUT
Cooperative Student Employment	CO-OP

6. Regular Rate

Classification	Minimum	Maximum
Student Aide	\$7.50	\$8.80
Student Assistant	\$7.63	\$10.92
Student Co-op	\$7.50	\$15.77
Student Graduate Specialist	\$7.50	\$15.77

See the Student Hiring Toolkit for additional student rate information
<http://hr.nmsu.edu/toolkits/>

7. FTE

Full Time Equivalency (FTE) is a numeric indicator of workload for an employee. FTE must be greater than 0.00 but less than or equal to 1.00

Example: FTE of 1 = 40 hours; FTE of .5 = 20 hours

See the Student Employment Handbook for additional information about FTE rules.

<http://hr.nmsu.edu/toolkits/>

8. Job Location

The job location is the organization number for the department that is hiring the employee. The Job Location field and Timesheet Orgn field must be different numbers.

The Job Location field is a dropdown menu that displays values in ascending order by job location number. You can quickly select the job location from the dropdown by selecting the job location menu and typing the job location number. Note that in order to move to the desired number using this method you must type the number rapidly on your keyboard.

The screenshot shows a section of the EPAF form with the following fields and labels on the left: "Job Location: *", "Timesheet Orgn: *", "Job Change Reason: *", and "Contract Number: (Not Enterable)". On the right, there are three input fields. The top field is a dropdown menu currently showing "Not Selected"; a callout bubble with the number "8" points to it. Below it is a search field containing "T15503"; a callout bubble with the number "9" points to it. Below the search field is a dropdown menu showing "HSHIR, Hire, Student". At the bottom is a text field containing "N/A".

9. Timesheet Orgn

The timesheet orgn is the organization number for the supervisor/approver of the employee and is used as part of the Web Time entry process for employees that report hours worked. The Timesheet Orgn field and Job Location field must be the different numbers. The timesheet orgn must begin with the letter T.

Labor Distribution Section

The labor distribution section populates with information from Banner regarding the funding for this position. For rehires you may need to simply verify that the information is correct, however in other cases the index number or distribution percentages may need to be changed.

Labor Distribution, 999992-00 Student Aide

Current
Effective Date: 07/01/2014

COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date

New
Effective Date: MM/DD/YYYY (Not Enterable) 07/01/2014

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date	Remove
N	107948	130005	101000	618100	0020					100.00				<input type="checkbox"/>
Total:										100.00				

Default from Index Save and Add New Rows

Labor Distribution Effective Date

The effective date for the labor distribution is initially defaulted to the query date that you selected when the EPAF was created. When the NBAJOBS Hire/Re-hire section is completed the Labor Distribution Effective Date will automatically change to the job effective date.

If the query date for the EPAF is later than the desired labor distribution effective date an error will occur and you'll need to delete the current EPAF and start a new transaction.

Errors and Warning Messages		
Type	Message Type	Description
Labor Distribution	ERROR	New Job Labor Distribution Date should be >= query effective date.
* - indicates a required field.		

Index and Account Code

If you are rehiring the employee for a position within the same department the index number for the labor distribution will automatically populate with the previously used index number. If this is a new hire for your department a default index number will be automatically populated into the index number field. You cannot submit the transaction with the default index number for your department so an appropriate index to fund this position should be selected. In any event, you should always verify that the index number is the correct funding source for the position, whether the transaction is for a new hire or a rehire.

Student Employment Type	Work-study Index	Account <i>Funding Distribution*</i>
Federal Work-study	103517	618200 <i>Department index pays 30% Work-study index pays 70%</i>
State Work-study	103553	618400 <i>Department index pays 30% Work-study index pays 70%</i>
Crimson Scholar (In State)	Contact Honors College	618500 <i>Department index pays 50% Crimson Scholar index pays 50%</i>
Crimson Scholar (Out-of-state)	108195	618700 <i>Department index pays 50% Crimson Scholar index pays 50%</i>
Tutor America Reads Program	119525	618100 <i>Tutor index pays 100%</i>
Co-op	Department Indices only	618100 <i>Co-op index pays 100%</i>
Regular	Department Indices only	618100 Department pays 100%

* All indices used in the Labor Distribution section should use the same account code

Changing an Index

If you need to change the index number, follow these steps:

1. Enter the new index number in the index number field.
2. Click the **Default from index** button.
 - a. The page will reload and an error will indicate that an account code is required.
3. Key in the account code into the Account field.
4. Click **Save and add new row**.

Adding an Index

In some cases the position may be funded by more than one funding source. If you need to add another index number to the labor distribution, follow these steps:

1. Place a capital **N** in the COA column of the next blank row.
2. Enter the new index number in the index number field on the next row of the labor distribution list.
3. Click the **Default from index** button.
4. Enter the account code number as appropriate.
5. Click **Save and add new row**.

Changing the labor distribution percentage

If the position is funded by more than one index number you can change the percentage that each index will pay out for the position. If you need to change the labor distribution percentages for the position, follow these steps:

1. Enter the percent to be distributed in the Percent field for the first index.

Note: You must enter a whole number. For example, use 50 to indicate 50%, not .5
2. Enter the percent to be distributed in the Percent field for the second index.

Additional indexes may be added to the labor distribution and the percentage should be indicated for each index. **The total of all distributions must equal 100%.**
3. Click **Save and add new row**.


Remove an Index

In some cases you may need to remove an index number used to fund a position. You only need to remove indexes if more than one index was used in the past and the additional index is not needed. If you need to change the index, follow the procedure for changing an index as described on page 18.

If you need to remove an index from the labor distribution, follow these steps:

1. Click the Remove checkbox associated with the index row that you would like to remove.

Cost	Percent	Encumbrance Override End Date	Remove
	100.00		<input type="checkbox"/>















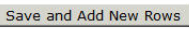


2. Click **Save and add new row**.

Routing Queue Section

The routing queue specifies the approval levels and approvers for the EPAF transaction.

You can default the routing queue used for each EPAF Category to specify the approvers used for future transactions. If you set-up the default routing queue you can still specify different approvers if necessary for each transaction. See the *Default Routing Queue* section (pg. 31) for additional details.

Routing Queue			
Approval Level	User Name		Required Action
20 - (D/VP) Dean/VP	 JGONZ054	Joaquin Gonzalez	Approve
99 - (PAY) Payroll	 JEKOENIG	Jennifer Lyn Enriquez	Apply
 Not Selected			 Not Selected
 Not Selected			 Not Selected
 Not Selected			 Not Selected
 Not Selected			 Not Selected
			

All EPAF's have a minimum of two levels of approvals: Dean/VP and Payroll. The Payroll level **does not approve or review the transaction in any way**, rather the Payroll level simply loads the EPAF records into Banner. **Only the approver selected for the Dean/VP level will review and approve the transaction.**

1. Enter the **User Name** for each level of approver
 - a. The search function can be used by clicking on the magnifying glass to the left of user name
 - b. For the **Payroll** approval level you may select any available approver on the search screen
2. Click **Save and Add New Rows** button to save your changes and populate the name of the approver

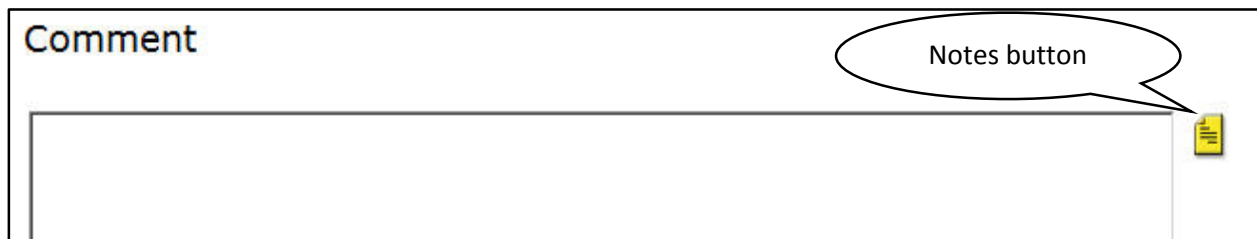
Comment

Originators add comments to the EPAF in order to provide additional information about the transaction that is not otherwise recorded in the submission form. The comments will be saved with the EPAF transaction and will be reviewed by EPAF approvers at the Dean/VP approval level. Both originators and approvers will be able to see the comments in the originator or approval summary screens respectively.

Adding comments to an EPAF

You can add multiple comments to an EPAF transaction; however comments cannot be deleted once the form is saved.

If the EPAF has already been saved with comments the comment contents will not display in the comment field. In order to see previously saved comments click the note button next to the comment field.



Comments may also be added to an EPAF by approvers. If an EPAF is returned for correction, the approver comments will provide information about why the EPAF was returned. See the section titled *Viewing Comments and Warnings* (pg. 26) for additional information about viewing EPAF comments.

Note: Comments cannot be deleted.

Save then Submit

Before you can submit an EPAF for approval you must save the EPAF.

Click **Save**
before **Submit**!

Save Submit

After you click submit the EPAF will validate. If errors or warnings are generated, you will see the error messages displayed at the top of the EPAF detail screen. You will not be able to submit the EPAF until the **VALIDATION** or **ERROR** message type errors have been corrected.

Errors and Warning Messages		
Type	Message Type	Description
Employee PEAEMPL & Activate Hire/Rehire NBAJOBS	VALIDATION	Home Organization and Job Location must match.
Employee PEAEMPL	VALIDATION	Home Organization and Distribution Orgn must match.

Ignore validation messages with the message type **WARNING**. In particular, you will often see an encumbrance method warning message upon submission (pictured below). No action is required for WARNING type messages.

Errors and Warning Messages		
Type	Message Type	Description
Activate Hire/Rehire NBAJOBS	WARNING	*WARNING* Encumbrance Method is Value Input and salary has changed.
* - indicates a required field.		

If the EPAF has been successfully submitted you will see a success message at the top of the EPAF detail screen.

Electronic Personnel Action Form

✓ The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit

Upon successful submission the EPAF will be routed to the Dean/VP level approver. The EPAF will now be on your EPAF Originator Summary screen under the History tab. For additional information about viewing saved and submitted EPAFs, see the section labeled *Originator Summary* (pg. 25).

Move an employee from work-study to regular funding

It is the responsibility of the employer to ensure the student's earnings do not exceed the work-study award for the Academic Year. IF EARNINGS EXCEED THE AWARD, THE EMPLOYER MUST PAY 100% OF THE OVERAGE. Work-study awards are subject to revision, increase or decrease because of changes to a student's situation, and/or availability of funding.

If a student depletes his/her work-study funds, any overage that may have occurred will be billed to their hiring department. The HSHIR EPAF can be used to change the funding source for a position from work-study funding to regular department funding in such situations. The procedure detailed below describes the process of changing the funding source for an existing student job from work-study funding to regular funding.

1. From the EPAF Main Menu, click **New EPAF**

2. Enter the employee's Aggie ID number

Type	Position Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Primary	199233 00	Univ Training Spec, Assc	530350, CENTER FOR LEARNING & PROF. DEV.	Oct 01, 2009		Nov 30, 2014	Active

3. Enter the 1st day of the month for the employee's effective start date.
4. Choose the **Student – Hire/Rehire ,HSHIR** approval category.
5. Click **Go**

6. From the Job Selection screen, locate the current job that you would like to modify. Note the position number and suffix used for this job.

New EPAF Job Selection

Enter or search for a new position number and enter the suffix, or select the link under Title.

ID: Sally Ann Rel, 8000
Query Date: Dec 01, 2014
Approval Category: Student - Hire/Rehire, HSHIR

Activate Hire/Rehire NB **OBSS**

Search Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
New Job	999992	00	Student Aide	101000, SPECIAL ORG MAIN					<input checked="" type="radio"/>
Primary	199233	00	Univ Training Spec, Assc	530350, CENTER FOR LEARNING & PROF. DEV.	Oct 01, 2009		Nov 30, 2014	Active	<input type="radio"/>

All Jobs **Go**

7. Key in the position number and position suffix for the job that you would like to modify.
8. Click **Go**
9. Click **Save**

Electronic Personnel Action Form

✓ Your change was saved successfully.

Enter the information for the EPAF and either Save or Submit

Name and ID: Sally Ann Rel, 8000
Transaction: 279803 **Query Date:** Dec 01, 2014
Transaction Status: Waiting
Approval Category: Student - Hire/Rehire, HSHIR

Save **Submit** **Delete**

10. Skip to the **Active Hire/Rehire NBAJOBS** section

Item	Current Value	New Value
Job Status: *(Not Enterable)		A
Contract Type: *		11 Secondary
Job Begin Date: MM/DD/YYYY (Not Enterable)		
Jobs Effective Date: MM/DD/YYYY (Not Enterable)		
Personnel Date: MM/DD/YYYY*		12 12/15/2014
Title:		13 Student Aide
Employee Class Code: *		14 SR
Salary Grade: *		15 REG

11. Set the Contract Type to **Secondary**.
12. Set the Personnel Date to the effective date of the new job
13. Title = Use the current value
14. Change the Employee Class Code to **SR**
15. Regular Rate = Use the current value
16. Remove the Work-study labor index from the Labor Distribution section

Percent	Encumbrance Override	End Date	Remove
70.00			16 <input type="checkbox"/>
30.00			

17. Make sure the remaining labor distribution department indices sum to equal 100%
18. Click **Save**
19. Click **Submit**









18	Save	Submit	19
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Originator Summary

The originator summary displays EPAF transaction information for EPAFs that have been submitted for approval or saved. The list only includes transactions that you have submitted. Transactions by other departments or other originators in your department will not display in this list.

Sorting the transaction list

You can sort the EPAF transaction list by column heading. Click the arrows in the column to be sorted in order to sort the transactions.

<i>EPAF Transactions</i>			
 Name 	1  ID 	 Transaction 	 Type of Change  2

1. Click the up arrow to sort the column in ascending order.
2. Click the down arrow to sort the column in descending order.

Note: You can only sort by one column at a time; you cannot sort using multiple columns simultaneously.

Viewing comments and warnings

You can view the comments and warnings recorded for an EPAF by selecting the link **Comments** or **Warnings** from the list of EPAF transactions.

This option will display all comments that were created by either the originator or approver.

Search Transactions

You can search for transactions if you know the first name, last name, or ID of the person that is affected by the transaction. You can also search by transaction number and limit the number of results displayed per page.

Note: You will only be able to see EPAFs that you have originated or EPAFs that have been routed to you for approval.

To search for transactions:

1. From the EPAF menu, click either **EPAF Approver Summary** or **EPAF Originator Summary**.
2. Click **Search**

The EPAF search screen displays.

Transaction Search

Enter the Last Name and or First Name of the person or an ID. Or, enter a Transaction number. wildcard.

Search Criteria

Last Name:

First Name:

Or

ID:

Or

Transaction Number:

Transactions per Page: 25

3. Search using information about the person being affected by the EPAF by typing their name or ID in the fields as indicated. You may also search using the EPAF transaction number if the transaction number is known.
4. Click **Go**
An EPAF search results screen will display showing all transactions that match your search criteria.
5. You can view the transaction detail for a transaction by clicking on the employee name.

Current tab

The current tab displays EPAF transactions that are saved or returned for correction.

Transaction status

Status	Description
Waiting	This status indicates that the transaction is in the process of being created and has not been submitted to the approval queue.
Pending	Indicates that the transaction requires positive action by the approver(s). The transaction remains at this status until action is taken by the person required to take action on the transaction.
Return for Correction	This status indicates that an EPAF has been returned for correction by the originator or the approver.
Approved	The transaction status is approved for the person when all the person(s) defined in the approval queue have approved the transaction. The transaction remains at this status until the person defined in the queue with apply privileges applies the transaction to the database.
Complete	The transaction status becomes Complete after the transaction has been applied to the database.
Disapproved	The transaction has been disapproved by a person defined in the approval queue. The individuals defined after them in the approval queue can no longer need to take action on the item.
Void	The originator or superuser has voided the transaction. It is no longer a valid transaction. The originator or superuser may void the transaction at any time during the approval process. The originator or superuser are the only people that can void the original transaction.
Canceled	This status will be used when you opt to cancel an entire transaction after it has been applied to the database. Cancelling a transaction after it has been applied will have no effect on the transaction in Banner.

Edit a saved EPAF

After the EPAF is saved it becomes available on the current tab of the EPAF originator summary. To edit a saved EPAF:

1. From the EPAF menu, click **EPAF Originator Summary**
The Current tab displays
2. Locate the transaction in the list
If you have several EPAFs you can sort, filter, or search for the transaction that you want to find.
3. Click on the **name** of the employee or **transaction ID** for the EPAF you want to edit.
The EPAF detail screen will open in preview mode (read only)
4. Click **Update** to edit the EPAF transaction.

Delete the EPAF

EPAFs that have been saved and have not been submitted for approval can be deleted. Once an EPAF is deleted it is permanently removed and it will not appear on the originator summary screen.

To delete an EPAF:

1. From the EPAF menu, click **EPAF Originator Summary**
The Current tab displays
2. Locate the transaction in the list
If you have several EPAFs you can sort, filter, or search for the transaction that you want to find.
3. Click on the **name** of the employee or **transaction ID** for the EPAF you want to delete.
The EPAF detail screen will open in preview mode (read only)
4. Click **Delete** to delete the EPAF transaction permanently.

Note: You cannot delete an EPAF if it has been submitted for approval. Only saved EPAFs can be deleted. In order to otherwise make a submitted EPAF inactive you should void the EPAF, which may require that you return the transaction for correction to yourself. For additional information about returning EPAFs for correction and voiding transactions, please see the History tab section below.

History tab

The history tab displays EPAF transactions that have been submitted for approval. In addition, EPAFs that have been voided will also appear under the history tab.

Return the EPAF for correction

An originator can return an EPAF for correction after it has been submitted for approval in order to make updates or to void the transaction. Once the EPAF has been returned for correction it will move to the Current tab of the originator summary screen.

Note: You can only act on EPAFs that you have originated.

To return an EPAF for correction:

1. From the EPAF menu, click **EPAF Originator Summary**
The Current tab displays
2. Click the **History** tab
3. Locate the transaction in the list
If you have several EPAFs you can sort or search for the transaction that you want to find.
4. Click on the **name** of the employee for the EPAF you want to return for correction.
The EPAF detail screen will open in preview mode (read only)
5. Click **Return for Correction** to move the EPAF back to your current tab.

Void the EPAF

EPAFs that have been saved or have been submitted for approval can be voided by the originator. Once an EPAF has been voided it will remain on the EPAF originator summary screen under the History tab.

1. From the EPAF menu, click **EPAF Originator Summary**
The Current tab displays
2. Locate the transaction in the list
If you have several EPAFs you can sort or search for the transaction that you want to find.
3. Click on the **name** of the employee for the EPAF you want to void.
The EPAF detail screen will open in preview mode (read only)
4. Click **Void** to remove the EPAF from approval queues and move the transaction to the history tab.

Default Routing Queue

Default routing queues can be set-up by approval category.

Mandatory levels are set-up automatically but you can manually populate the Dean/VP approval user and the Payroll approval user.

Default routing queues are available for each EPAF approval category. If you use more than one EPAF approval category you need to set the defaults for each category used.

Set the default routing queue

The screenshot shows the 'EPAF Default Routing Queue' form. Callout 3 points to the 'Select Approval Category and Go' instruction. Callout 4 points to the 'Go' button. Callout 5 points to the magnifying glass icon in the 'User' field of the first row. Callout 6 points to the 'Save and Add New Rows' button.

Approval Level	User	Required Action
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

1. From the EPAF Menu, click **EPAF Originator Summary**
2. Click **Default Routing Queue**
3. From the **Approval Category** drop-down list, select the approval category for which the routing queue defaults will be set.
4. Click **Go**.

Different approval categories may have different approval levels and required actions which will be pre-populated into the approval level field and required action field respectively. For each approval level you will select a user that will be the default value every time you use the approval category. Note: Approvers at various levels can be changed on a case-by-case basis as you are submitting the EPAF, even if a default exists.

5. Use the magnifying glass icon to select the user to populate in the approval level field.
 6. Click **Save and Add New Rows**.
- Repeat the process for each approval category where you would like to set default values.

EPAF Approvals

Approval processing begins when an EPAF is submitted. The transaction will appear under the approvers EPAF Approver Summary in Self Service Banner (SSB). Approvers act to validate and approve all EPAF transactions based on the approval queue that is required for the personal action that is being originated. The approval queue is specified by the originator when the EPAF is created during the origination process.

Banner EPAF does not generate email notifications when EPAF transactions are pending. Approvers must check their approval queue periodically.

EPAF Approver Summary

EPAF Approver Summary

Current In My Queue History

Select the link under Name to access details of the transaction.

✓ Filtering On

Queue Status: All Pending Go

[New EPAF](#) | [Update Proxies](#)

Select All Reset Save

Viewing pending approvals

1. From the EPAF menu, click **EPAF Approver Summary**
The Current tab displays with a list of transactions awaiting your approval.
2. Locate the transaction in the list that you want to evaluate
If you have several EPAFs you can sort, filter, or search for the transaction that you want to find.
3. Click on the **name** of the employee or **transaction ID** for the EPAF you want to evaluate.
The EPAF detail screen will open in preview mode (read only)

Important checks for approvers

Listed below are some important manual checks that you'll need to perform for each EPAF transaction.

Labor Distribution Section

Index number

Confirm that the correct index number is being used to fund the position.

Account

Confirm that the correct account is being used for this type of expenditure.

Comments

Comments are added to the EPAF transaction by the Originator when the EPAF is created. Originators use the comments section to include additional information about the transaction not otherwise recorded in the available form fields. Examine the comments to determine if sufficient information is provided in order to approve the transaction.

Return an EPAF for correction

If the EPAF transaction lacks required details or contains errors you can return the EPAF for correction to the originator of the EPAF.

To return the EPAF for correction:

1. From EPAF approver preview screen, click **Add Comment**.
2. Add comments to the transaction with sufficient information that would enable the originator to identify and correct the error or omission in the EPAF transaction.
3. Click **Save** to save the comments.
4. Click **Return for Correction** to return the EPAF to the Originator.

Approving an EPAF transaction

If the EPAF transaction contains all required details and no errors are found you can approve the transaction in order to move the transaction to the Apply transaction status.

To approve the EPAF transaction, from EPAF approver preview screen, click **Approve**.

Filter Transactions

Filters apply to both the current and history tabs. Filters allow you to view only those records that meet your filter parameters directly through your Originator or Approver Summary screens. You can filter transactions by date and choose the number of records to display per page.

The screenshot shows a web form titled "Proxy or Superuser or Filter Transactions". Below the title is a yellow bar with a speech bubble icon and the text: "Act as a proxy or a superuser and enter the following criteria to filter transactions." The form contains the following fields and controls:

- Proxy For:** A dropdown menu with "Self" selected.
- Act as a Superuser:** An unchecked checkbox.
- Submitted From Date: MM/DD/YYYY**: A text input field with a callout bubble labeled "2" pointing to it.
- Submitted To Date: MM/DD/YYYY**: A text input field with a callout bubble labeled "3" pointing to it.
- Transactions Per Page:** A dropdown menu with "25" selected and a callout bubble labeled "4" pointing to it.
- Go**: A button with a callout bubble labeled "5" pointing to it.

To add a filter:

1. From the EPAF Menu, click **Act as a Proxy**.
2. Set the **submitted from date** as appropriate to limit returned results in your summary screen that are greater than the date entered.
3. Set the **submitted to date** as appropriate to limit returned results in your summary screen that are less than the date entered.
4. Set the number of results to display per page by selecting an option from the **transactions per page** drop-down list.
5. Click **Go**

Once a filter is applied it will remain until you remove the filter.

To remove a filter:

1. From the EPAF Menu, click **Act as Proxy**.
2. Clear all date fields in the filter screen.
3. Click **Go**

Proxy Set-up

EPAF approvers can allow proxy access to their approver summary for other users in the system. Note that in order to assign proxy access to another user the intended proxy must already have access to the EPAF system.

To add a proxy:

1. From the EPAF Menu, click **EPAF Proxy Records**.

The screenshot shows the top navigation bar with tabs: Personal Information, Student, Financial Aid, and Employee. Below the tabs is a search bar with a 'Go' button. The main heading is 'Electronic Personnel Action Form'. A list of links is displayed: EPAF Approver Summary, EPAF Originator Summary, New EPAF, EPAF Proxy Records (highlighted with a dashed border and a callout bubble labeled '1'), and Act as a Proxy. At the bottom, it says 'RELEASE: 8.5'.

2. As appropriate, choose the **Approval Level** from the approval level dropdown list.
 3. Select the name of the intended proxy from the **Name** dropdown list.
- Note: You can quickly select the name from the list by selecting the dropdown and typing the last name of the proxy.

The screenshot shows the 'EPAF Proxy Records' form. It has the same navigation bar as the previous screenshot. Below the heading, there is an 'Approval Level' dropdown menu with 'Dean/VP, D/VP' selected (callout bubble '2'). Below that is a 'Name' dropdown menu with 'Not Selected' (callout bubble '3'). To the right of the 'Name' dropdown are 'Remove' and 'Add' buttons (callout bubble '4'). At the bottom left is a 'Save' button (callout bubble '5').

4. Click the **Add** checkbox.
5. Click **Save**.

The screenshot shows the 'EPAF Proxy Records' form. At the top is a yellow header bar. Below it, the title 'EPAF Proxy Records' is displayed. The form contains the following elements: an 'Approval Level' dropdown menu with 'Dean/VP, D/VP' selected (callout 2); a 'Name' field with a search icon and '(Name)' placeholder; a 'Remove Add' button (callout 3); a 'Not Selected' dropdown menu; a 'Save' button (callout 4); and two checkboxes, one of which is checked.

To remove a proxy:

1. From the EPAF Menu, click **EPAF Proxy Records**.
2. As appropriate, choose the **Approval Level** from the approval level dropdown list.
3. Click the **Remove** checkbox next to the name of the user whose access should be removed.
4. Click **Save**.

Act as a Proxy

If you have been assigned proxy access by another user you can view the approver summary for that user and act on their behalf.

The screenshot shows a web form titled "Proxy or Superuser or Filter Transactions" with a yellow header bar. Below the title is a blue icon and the text: "Act as a proxy or a superuser and enter the following criteria to filter transactions." The form contains the following fields and controls:

- Proxy For:** A dropdown menu currently showing "Self". A callout bubble with the number "2" points to the dropdown arrow.
- Act as a Superuser:** An unchecked checkbox.
- Submitted From Date:** A text input field with the placeholder "MM/DD/YYYY".
- Submitted To Date:** A text input field with the placeholder "MM/DD/YYYY".
- Transactions Per Page:** A dropdown menu currently showing "25".
- Go:** A button with a callout bubble containing the number "3" pointing to it.

To act as a proxy:

1. From the EPAF Menu, click **Act as a Proxy**.
2. From the **Proxy For** dropdown list, choose the user from the list of users.
3. Click **Go**.

Note: Your Proxy access will be enabled for the entire session. Any actions taken by you when acting as Proxy will be recorded under your name, not the name of the proxy. Proxy access simply allows you to view information available under another user's approver summary. Proxy access does not grant additional security.

Glossary of common terms

Approval Category	Refers to the name of the EPAF and its purpose. It must contain one approval type at the least.
Approval Level	Refers to a step in the approval hierarchy through which the transaction must go through before applying changes to the database.
Approval Type	Refers to the type of actions requested on the EPAF form. Every approval type shows on the form as a separate section. Examples of such types are the Job Details Information and the Job Labor Distribution types or sections.
Approver	Any user designated as part of the approval hierarchy to approve or reject an EPAF.
Effective Date	The payroll effective date of the action. This date cannot be before the last paid date. If the real action date is prior to this date, you must enter the next day.
Originator	The user initiating and submitting the EPAF transaction.
Personnel Date	The date the action is effective; the true effective date.
Query Date	The first date of the month when the employee will report to work.
Queue Status	Refers to the status of the transaction with regard to an individual defined in the routing queue.
Transaction	Refers to the whole approval process from the moment it was initiated by the originator to the moment when changes are applied to the database.
Transaction Status	Refers to the status of the EPAF transaction as a whole.